

Your logo

Your company name

Address

Phone

Email

License # / registration #

Job name

Job address

Date

TAKEOFF

SLOPES						
Slope name	Length (ft)	Width (ft)	Pitch (x/12)	Flat area	Pitch factor	Roof area
Totals						

Fill in: one row per roof plane, measured flat (from the ground or a plan). Measured on the roof itself? Type 0 for pitch.
 Example: Front, 40 x 30 ft, pitch 6. Back, 40 x 30 ft, pitch 6.

LINEAR MEASURES AND COUNTS			
Eave		If	Bottom edges of the roof.
Rake		If	Sloped gable edges.
Ridge		If	
Hip		If	
Valley		If	
Step flashing		If	Where the roof meets a wall.
Chimneys		count	
Chimney size			Example: 3 ft x 4 ft. For your chimney flashing.
Skylights		count	
Pipes		count	Plumbing vent pipes. One pipe boot each.
Vents		count	Box vents, exhaust vents.
Decking to replace		sheets	Fill in: sheets to replace (4 x 8 ft).

SQUARES			
Waste factor %	10	%	Type 10 for 10 %. Use 15 for hip roofs and cut-up roofs.
Total roof area		sq ft	From the slope table.
Squares		sq	100 sq ft = 1 square.
Squares with waste		sq	Squares x (1 + waste % / 100).

Fill in: the yellow cells. Grey cells are formulas. This workbook is for you, not the customer.

Your logo

Your company name

Address _____

Phone _____

Email _____

License # / registration # _____

Job name _____

Job address _____

Date _____

ORDER LIST							
Material	Unit	Coverage per unit	Quantity needed	Order qty	Unit cost	Line cost	How it is figured
Shingles	bundle	33.3 sq ft					Squares with waste x 100 / sq ft per bundle.
Starter	bundle	100 lf					(Eave + rake) / lf per bundle.
Hip and ridge cap	bundle	33 lf					(Ridge + hip) / lf per bundle.
Synthetic underlayment	roll	10 sq					Squares with waste / squares per roll.
Ice and water shield	roll	66 lf					(Eave + valley x 2) / lf per roll. A 2 sq roll is about 66 lf.
Drip edge	piece	10 ft					(Eave + rake) / ft per piece.
Step flashing	piece	1 ft					Step flashing lf / ft per piece.
Pipe boots	each						One per pipe.
Ridge vent	piece	4 ft					Ridge / ft per piece.
Roofing nails	box	7,200 nails					Squares with waste x 320 / nails per box (4 nails per shingle).
Cap nails	box						Fill in: squares one box covers (check the box).
Sealant	tube	5 sq					Squares with waste / squares per tube (1 per 5 sq).
Decking	sheet	32 sq ft					Sheets to replace, from the Measure tab. A 4 x 8 sheet is 32 sq ft.
Dumpster	each						Fill in: number of dumpsters. Its cost goes to the Job cost tab.
Total material cost							All rows but the dumpster.

Fill in: your unit costs in the yellow column. Change a coverage to match the product label. Order qty rounds up to whole units.
Bundles per square: 3 for most 3-tab and architectural shingles; some heavier lines take 4. Check the wrapper.
Ice and water shield: add rakes where your code requires it.

Your logo	Your company name Address Phone Email License # / registration #	JOB COST Job name Job address Date
-----------	--	--

MATERIALS

Materials		\$	Total material cost, from the Order list tab.
-----------	--	----	---

LABOR

Method 1: crew time			
Crew size		people	
Days		days	
Hours per day		hours	
Hourly rate		\$ per hour	Per person, with payroll costs if you include them.
Labor cost, method 1		\$	Crew size x days x hours per day x hourly rate.
Method 2: per square			
Rate per square		\$ per sq	
Squares with waste		sq	From the Measure tab.
Labor cost, method 2		\$	Rate per square x squares with waste.
Use		1 or 2	Fill in: 1 or 2. Blank: the sheet uses method 1 if you filled it in, else method 2.
Labor cost		\$	The method in the Use cell.

OTHER COSTS

Dumpster		\$	Line cost from the Order list tab.
Permit		\$	
Equipment rental		\$	
Fuel		\$	
Subcontractor		\$	
Warranty reserve %	2	%	Type 2 for 2 % of the sale price.
Warranty reserve		\$	Sale price x warranty reserve % / 100.

SALE AND PROFIT

Sale price		\$	Fill in: the price on your estimate or contract.
Total job cost		\$	Materials + labor + other costs.
Gross profit		\$	Sale price - total job cost.
Gross profit %		%	Gross profit / sale price x 100.
Overhead %		%	Fill in: yearly overhead / yearly sales x 100.
Overhead		\$	Sale price x overhead % / 100.
Net after overhead		\$	Gross profit - overhead.
Net after overhead %		%	Net after overhead / sale price x 100.

PROFIT CHECK

Target margin %		%	Fill in: the net margin you want on this job.
Profit check			OK when net after overhead % meets the target.

Overhead decides the margin you need. Track a year of overhead and sales to set your target.